Job Aid:

How to Create a Release Requisition and Purchase Order (Contract Purchase)

This Job Aid shows how to:

- Create a Release Requisition in COMMBUYS
- Submit the Requisition for approval in COMMBUYS
- Send the Vendor a Release Purchase Order

Of Special Note:

Requisitions are documents used to request goods and services; they are the first document you use to generate a Purchase Order. This job aid will show how to submit a request for goods and services from Statewide Contract (SWC) and Department Contracts. Once the requisition is approved a purchase order is generated and can be sent to the vendor.

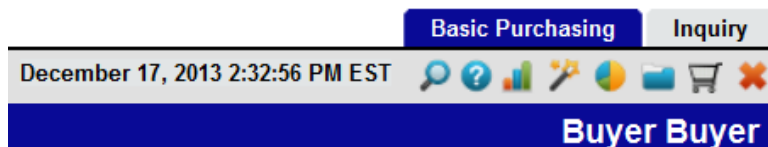| Screenshot	Directions
	1. Launch the COMMBUYS Web site by entering the URL https://www.commbuys.com/bso/ in the Browser. Enter your login credentials and click the **Login** button on the COMMBUYS home page.

Job Aid:
How to Create a Release Requisition and Purchase Order (Contract Purchase)

Screenshot	Directions
	2. Upon successful Login, if you have multiple roles in COMMBUYS, select the **Basic Purchasing** or **Department Access** role on the upper right side of the page, if not already selected.
	3. From the Navigation Bar, select **Documents > Requisitions > New**
New Requisition	4. The **General** tab for a new requisition opens. On the left side of the screen, complete the following fields**:** (*) are required fields.
Requisition Number:	• **Department***: defaults from user profile. May be changed, using the dropdown if other departments are available to user.
Status: 1RI - Requisition In Progress (When User request is created)	• **Location***: defaults from user profile. May be changed, using the dropdown if other locations are available to user.
Department*: 00100 - PETS PLUS	• **Required by Date**: date goods or services needed. (optional)
Location*: 100 - BOS-PP	• **Requisition Type**: release; contract purchase indicator (optional)
Required By Date:	• **Requestor**: user that created the requisition (auto populates)
Requisition Type : Release	• **Contact**: contact for this requisition, will default to the requester
Requestor: Buyer Buyer	• **Estimated Cost**: calculated by COMMBUYS; not editable by user
Contact: Buyer Buyer	• **Alternate ID:** leave blank
Alternate ID:	• **Print Format*:** leave blank
Estimated Cost: $0.00	
Print Format: *	
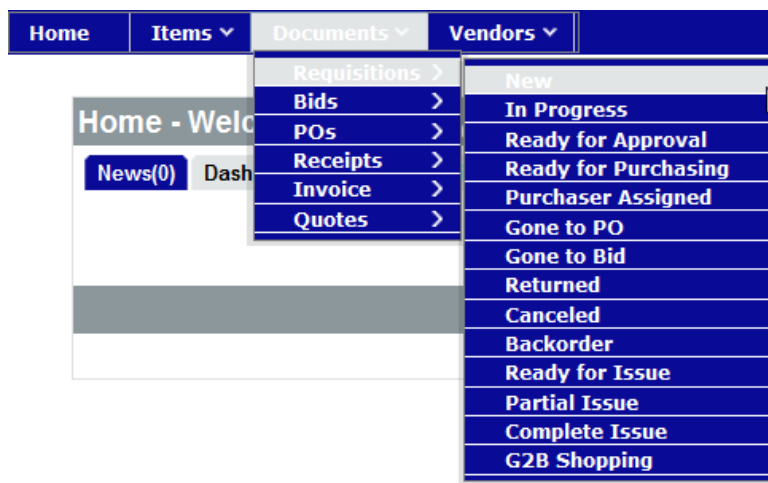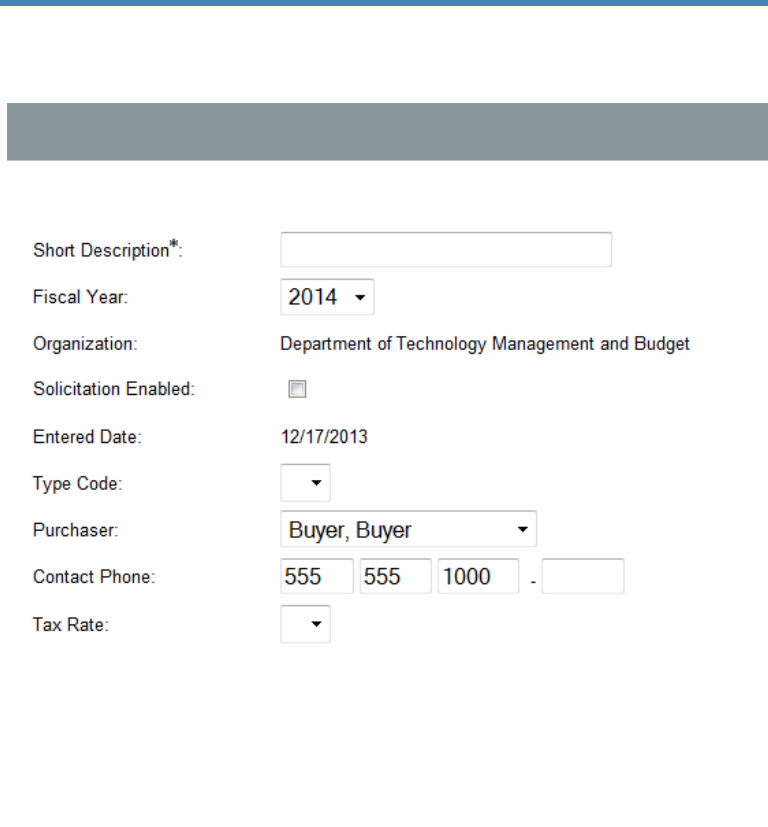
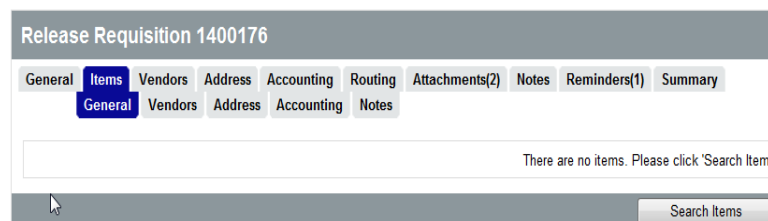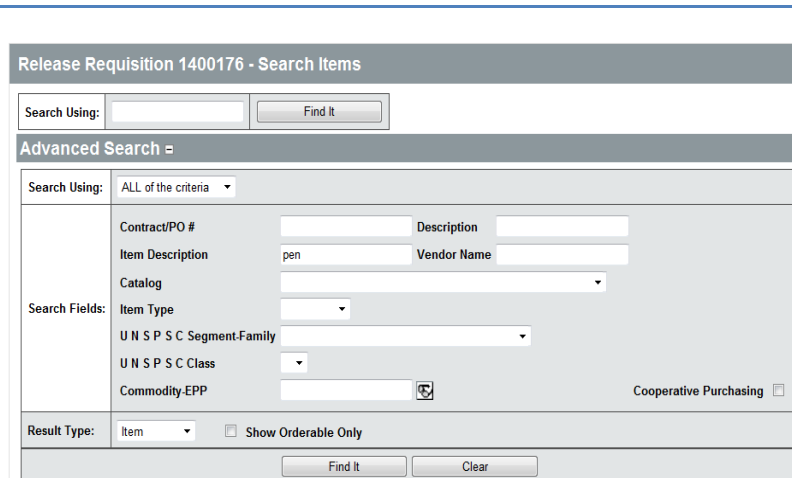| Screenshot	Directions
Short Description*: [ ] Fiscal Year: 2014 ▼ Organization: Department of Technology Management and Budget Solicitation Enabled: ☐ Entered Date: 12/17/2013 Type Code: ▼ Purchaser: Buyer, Buyer ▼ Contact Phone: 555 555 1000 - [ ] Tax Rate: ▼	5. The right half of the **General** tab, complete the following fields: (*) are required fields. • **Short Description***: be specific as this field can also be used as search criteria to locate a requisition – can be used as a place for your Department doc number • **Fiscal Year**: defaults to the current Fiscal Year • **Organization**: default value based on your user profile • **Solicitation Enabled**: select if this requisition will convert to a bid (request quotes from Contract vendors) • **Entered Date**: defaults to the current date • **Type Code**: select the most appropriate option from the drop down list • **Purchaser**: defaults to users' name; use the dropdown to select a different purchaser • **Contact Phone**: defaults to user's profile value; can be updated as needed • **Tax Rate**: N/A for Commonwealth, leave blank. Click the **Save & Continue** button to save the information entered on the General tab.
Release Requisition 1400176 General **Items** Vendors Address Accounting Routing Attachments(2) Notes Reminders(1) Summary General Vendors Address Accounting Notes There are no items. Please click 'Search Items' Search Items	6. To add items to the requisition, click on the **Items** tab. Click the **Search Items** button to begin the process of adding contract goods or services to the requisition.
Release Requisition 1400176 - Search Items Search Using: [ ] Find It **Advanced Search** ⊟ Search Using: ALL of the criteria ▼ Contract/PO #: [ ] Description: [ ] Item Description: pen Vendor Name: [ ] Catalog: [▼] Search Fields: Item Type: [▼] U N S P S C Segment-Family: [▼] U N S P S C Class: [▼] Commodity-EPP: [ ] ☑ Cooperative Purchasing ☐ Result Type: Item ▼ ☐ Show Orderable Only Find It Clear	7. The item lookup or Search Items page opens. Input the search criteria and click **Find It.** **Or** click **plus (+)** sign next to Advanced Search to open more search fields. Enter search criteria and click **Find It** to reveal search results**.**

Screenshot	Directions
Release Results Release Search By: Any Price ● Up to $2 (9) ● $2 - $5 (1) Any Vendor ● Bob Barker Co., Inc. (1) ● Chrarm-Tex (1) ● Garelick Farms (1) ● Mathematica Policy Research Inc. (1) ● Office Essentials (4) Show more (table of release results with Select, Quantity, Minimum Order Quantity, Item Description, Unit Cost, UOM, Vendor Name columns) Ballpoint pens, medium, blue ink — $1.00 — EA - Each — Office Essentials Ballpoint pens, medium, black ink — $1.00 — EA - Each — Office Essentials Ballpoint pens, fine, blue ink — $1.25 — EA - Each — Office Essentials Ballpoint pens, fine, black ink — $1.25 — EA - Each — Office Essentials Rollerball pens — $3.12 — Pets R Us Instructions for bidders - Rules 1) Calendar Rule Type: An additional opportunity to respond may be offered during ... — $0.00 — Garelick Farms Instructions for bidders - Rules 1) Calendar Rule Type: ... **Add to Req & Exit** **Cancel & Exit**	8. The search results display showing unit cost, UOM, vendor, etc. for each item. Check the **Select box** of the desired item. Enter a number in the quantity field and click the **Add to Req & Exit** button located at the bottom of the page. The search process is the same for a service, although some SWC & Departmental Contracts will have **conversion vendor** under vendor name.
Release Requisition 1400176 General **Items** Vendors Address Accounting Routing Attachments(2) Notes Reminders(1) Summary **General** Vendors Address Accounting Notes Sort by Column: Print Sequence ☐ Sort Descending Go 	Item #	Links	Print Sequence	Quantity	Minimum Order Quantity	Catalog Price/ Unit Cost
1	Master Blanket # / Line #: 0000097 / 1	1.0	Ballpoint pens, medium, blue ink — 24.0	0.0	$1.00
2	Master Blanket # / Line #: 0000097 / 2	2.0	Ballpoint pens, medium, black ink — 24.0	0.0	$1.00
3	Master Blanket # / Line #: 0000097 / 3	3.0	Ballpoint pens, fine, blue ink — 24.0	0.0	$1.25
4	Master Blanket # / Line #: 0000097 / 4	4.0	Ballpoint pens, fine, black ink — 24.0	0.0	$1.25		9. The **Items** tab refreshes with the selected items added to the requisition. You can click on the **item # (number)** (left side of page) to view additional details **NOTE:** The master blanket number of the selected item(s) is located also included. (this is the COMMBUYS Contract number)

Screenshot	Directions
Release Requisition 1400176 Status: 1RI - In Progress General **Items** Vendors Address Accounting Routing Attachments(2) Notes Reminders(1) Summary **General** Vendors Address Accounting Notes Item #: 1 Item Type: Normal Print Sequence*: 1.0 Item Status: 1RI - In Progress Master Blanket # / Line #: 0000097 / 1 Minimum Order Quantity: 0.0 Master Blanket Line Description: Ballpoint pens, medium, blue ink Description *: Ballpoint pens, medium, blue ink <table><tr><th>Quantity</th><th>Catalog Price/ Unit Cost</th><th>Net Unit Cost</th><th>UOM</th><th>Discount %</th><th>Total Discount Amt.</th><th>Total</th></tr><tr><td>24.0</td><td>$1.00</td><td>$1.00</td><td>EA - Each</td><td>0.0%</td><td>$0.00</td><td>$24.00</td></tr></table> U N S P S C Segment-Family: 10-10 - Live animals Tax Rate: U N S P S C Class: 15 - Livestock Tax Amount: $0.00 Commodity-EPP: 10-10-15-04-0000 : Mink Extended Amount: $24.00 Manufacturer: Brand: Model: Make: Packaging: Save & Exit Save & Continue Save & Copy Reset Cancel & Exit	10. Item detail opens. This is where you have the option to edit the **Description Field.** **Note:** Important for some contracts where you need to explain item/service detail **Note**: Items/services with a $0 unit cost can be edited to enter a correct cost and item description. Follow instructions on the Master Blanket in COMMBUYS to obtain item and pricing data.
Release Requisition 1400176 General Items **Vendors** Address Accounting Routing Attachments(2) Notes Reminders(1) Summary <table><tr><th>Vendor ID</th><th>Alternative ID</th><th>Vendor Name</th><th>Preferred Delivery Method</th></tr><tr><td>00000028</td><td></td><td>Office Essentials</td><td>Email</td></tr></table> Save & Continue Print	11. Click the Vendor tab. The **Vendor** tab contains information about the vendor that will receive the purchase order and deliver the items. This information is auto populated based on the items/services selected.
Release Requisition 1400176 General Items Vendors **Address** Accounting Routing Attachments(2) Notes Reminders(1) Summary **Address Validation Warnings** • Item # 1, 2, 3 and 4: No ship-to address. Ship-to address "100 - 10055" at header level will be used instead. **Ship-to Address** 100 - 10055 Anne Bell One Congress Street 11th floor Boston, MA 02114 US Email: linda.banks-grant@accenture.com Phone: (617)999-9999 Save & Continue Apply Ship-to to All	12. Click the **Address** tab. The **Address** tab opens. Displayed here is the left side of the page where the Ship-to Address is located. As long as the ship to address is present at the header level and all items are going to the same ship-to address, the ship-to address does not need to be on each individual requisition line item.

Job Aid:

How to Create a Release Requisition and Purchase Order (Contract Purchase)

Screenshot	Directions
Release Requisition 1400176 General Items Vendors Address Accounting Routing **Attachments(2)** Notes Reminders(1) Summary **Agency(0)** Vendor(0) **Files** ⓘ Click **Add File** to add file attachments. No File Attachments **Forms** ⓘ Click **Add Form** to add form attachments. No Form Attachments Add File Add Form	13. Click the **Attachment** tab. The **Attachments** tab allows the addition of either files or forms to the requisition. Click the **Add File** button. **Add Form:** not currently in use
Add File ⓘ **Name** is the display name for the file that will appear where attachment repository files are displayed. It can be different fro Name*: [_____] Description: [_____] File*: [_____] Browse... Location: agency Save & Exit	14. The **Add File** window opens. Click the **Browse** button to add the file. This will search for document from your computer.
Add File ⓘ **Name** is the display name for the file that will appear where attachment repository files are displayed. It can be different from the name on disk and can contain alphanumeric characters, spaces, and Name*: attachment two Description: attachment two of two File*: C:\My Files\1 - Commonwealth of Massachusetts\1 - Training\Trainir Browse... Location: agency Save & Exit Save & Continue Reset Cancel & Exit	15. Complete the following fields: • **Name:** auto populates after you select the file; can be changed. • **Description:** optional but recommended; short description of the file Click **Save & Continue** upon successful entering of field data**.**
Attachment File Detail: attachment two Name*: attachment two Description: attachment two of two File*: 📄 Doc2.docx Location: agency Size: 18,620 bytes Last Modified On Disk: Uploaded: 12/19/2013 11:01:39 AM Uploaded By: Save & Exit Save & Continue	16. After uploading the file, click the file icon to open the file and view. When complete, click **Cancel & Exit** to return to the **Attachments** tab.

Job Aid:

How to Create a Release Requisition and Purchase Order (Contract Purchase)

Screenshot	Directions
Open Market Requisition 1400176 General Items Vendors Address Accounting Routing **Attachments(2)** Notes Reminders(1) Summary **Agency(2)** Vendor(0) **Files** 	Name	Description	Show Vendor	
---	---	---
Meeting format.docx		☑
attachment two	attachment two of two	☑ | **Forms** ⓘ Click **Add Form** to add form attachments. No Form Attachments Save & Continue Add File Status: 1RRA - Ready for Approval | Attached By	Attached Date	Delete
---	---	---
Buyer Buyer	12/17/2013	☐
Buyer Buyer	12/19/2013	☐	 hments e Add Form	17. The **Attachment** tab redisplays with a list of attached files. *You can opt to disallow the vendor to view the attachments by unchecking the **Show Vendor** box. **NOTE:** This screen is split for ease of viewing

Release Requisition 1400176
General Items Vendors Address Accounting Routing Attachments(1) Notes Reminders(1) **Summary**
Overall Validation Warnings
● Item # 1, 2, 3 and 4: No ship-to address. Ship-to address "100 - 10055" at header level will be used instead.
Header Information
Requisition Number: 1400176   Short Description:
Organization: Operational Services Division
Department: 00100 - PETS PLUS   Location:
Entered Date: 12/17/2013   Requisition Type:
Requestor: Buyer Buyer   Purchaser:
Contact: Buyer Buyer   Contact Phone:
Pcard Enabled: No   Estimated Cost:
Solicitation Enabled: No
Invoice Method: Three Way Match
Ship-to Address: Anne Bell   Bill-to Address:
  One Congress Street
  11th floor
  Boston, MA 02114
  US
  Email: linda.banks-grant@accenture.com
  Phone: (617)999-9999
 	
Status: 1RI - In Progress
 	
Test Requisition   Status: 1RI - In Progress
 	
100 - BOS-PP   Required By Date: 01/16/2014
Release   Type Code:
Buyer Buyer   Fiscal Year: 2014
(555)555-1000   Alternate ID:
$108.00   Print Format:
 	
Inventory User
211 E. 7th Street
Suite 1100
211 E. 7th Street
Austin, TX 78701
US
Email: gflores@periscopeholdings.com
Phone: (512)666-9403
	18. Click the **Summary Tab** to view a summary of the nearly completed requisition.
	
	NOTE: Picture is split for ease of viewing
	
	Other/optional tabs:
	● **Accounting Tab:** Phase II
	● **Routing Tab:** auto-populated, after approval, based on approval workflow
	● **Notes Tab:** optional
	● **Reminders Tab:** optional

Screenshot	Directions
Item # 4 : Ballpoint pens, fine, black ink 1RI - In U N S P S C Segment-Family: 10-10-15-04-0000 	Blanket/Contract #/Line #	Qty	Minimum Order Quantity	Unit Cost	Net Unit Cost
0000097 / 4	24.0	0.0	$1.25	$1.25 | Manufacturer: Brand: Make: Packaging: Account Code There is no item accounti [Submit for Approval] [Cancel Requisition] Progress | UOM	Discount %	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost
EA - Each	0.00%	$0.00		$0.00	$30.00	 Model: Amount ng available for this item. Recommended Vendor: 00000028 - Office Essentials Linda Banks-Grant 1500 Outstanding Way Suite 5670 Boston, MA 02114 US Email: linda.banks-grant@accenture.com Phone: (617)800-8000 [Clone Requisition] [Print]	19. Shown here is the lower part of the **Summary** tab that provides a summary of each item on the requisition as well as the action buttons currently available for the requisition. • Submit for Approval • Cancel Requisition • Clone Requisition • Print Review the Summary page information. Click the **Submit for Approval** button to submit the requisition into workflow for approval. **NOTE:** Picture is split for ease of viewing
Message from webpage ❌ ❓ Are you sure you want to submit this requisition? [OK] [Cancel]	20. A popup message displays asking 'Are you sure you want to submit this requisition?' Click **OK** to continue with the submission. To cancel the submission, click **Cancel**.
Only one approval path "022" matches the document's criteria. 	Approval Path	Description	Dollar Range
022	just to make sure	$0.00-$100.00	 Please click Continue to continue submitting the document, or click Cancel & Exit to cancel the document submission and go back to the document. [Continue] [Cancel & Ex	21. The approval path for the requisition displays. It provides information about the approval path such as description, dollar range, user, the approval level and the approval type. Click **Continue** to complete submission.

Screenshot	Directions
Status: 1RRA - Ready for Approval	22. The requisition Summary tab redisplays. The status has been updated to: • Status 1RRA – Ready for Approval **Note: For Department Access and some Basic Purchasing users the process ends at this step, the submission of the release requisition into workflow for approval. This will depend upon your agency / department purchasing workflow approval process.**
Home - Welcome Back Buyer Buyer News(0) Reqs(4) Bids(8) PO(1) Approval(0) My Reminders(0) Events(0)	23. Depending on your agency's COMMBUYS workflow and your COMMBUYS user role, once the requisition has been approved you are able to find the generated Purchase Order (PO) and send the PO to the Vendor. From your **Control Center** click on the **PO** tab.
Home - Welcome Back Buyer Buyer News(0) Reqs(4) Bids(8) PO(1) Approval(0) My Reminders(0) Events(0) In Progress(0) Ready for Approval(0) Ready to Send(1) Returned(0) Change Order(0) Purchase Order #: 0000013.3, Organization: Operational Services Division, Purchase Order Date: 08/08/2014, Description: PO Test, Dept/Loc: 1080CONVD/1080L, Purchaser: Buyer Buyer, Vendor Name: Garelick Farms, LLC, Total: $132.00 List & Send Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.	24. Click on **Ready to Send**, which is a sub tab of PO. You will see all the purchase orders you as a user have in Ready to Send status. A new COMMBUYS number was created for the Purchase Order so review the Description and Vendor name then click on the correct **Purchase Order #.**
Vendor Notification Actions Option(s): ● Send Email and Notify Vendor ○ Set to Printed Status Save & Continue Print Print Vendor Copy	25. The PO opens to the **Summary tab**; review all information for accuracy. Scroll down to the bottom of the page and select one of the options: • Send Email and Notify Vendor • Set to Printed Status (still posts purchase order on COMMBUYS but does not send any vendor emails) Click **Save and Continue** to finalize the PO and place the order.